Drilling Technology and New Applications: Growing the USA's Natural Gas and Oil Supply Revolution

Piotr Galitzine, Chairman, TMK IPSCO
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Some thought-provoking world stats after year-end 2011

<table>
<thead>
<tr>
<th>Description</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Global energy consumption; the strongest growth since 1973.</td>
<td>+5.6%</td>
</tr>
<tr>
<td>China's share of global energy consumption; the world's largest.</td>
<td>20.3%</td>
</tr>
<tr>
<td>Growth in global oil consumption; the weakest among fossil fuels.</td>
<td>+3.1%</td>
</tr>
<tr>
<td>Natural gas consumption growth; the strongest since 1984.</td>
<td>+7.4%</td>
</tr>
<tr>
<td>Coal's share of global energy consumption; the highest since 1970.</td>
<td>29.6%</td>
</tr>
<tr>
<td>Chinese share of global coal consumption.</td>
<td>48.2%</td>
</tr>
<tr>
<td>Share of renewables in global energy consumption.</td>
<td>1.8%</td>
</tr>
</tbody>
</table>

Source: BP Statistical Review of World Energy June 2011
Change in the Energy Consumption Pie – 1990-2010

1990
9,382 million tons of oil equivalent

2010
12,002 million tons of oil equivalent

Source: BP Statistical Review of World Energy, June 2011; Financial Times
“Guesstimated” Unconventional Hydrocarbon as a Multiple of Traditional Oil and Gas Deposits

Source: Company, eON
“Guesstimated” Unconventional Hydrocarbon as a Multiple of Traditional Oil and Gas Deposits

* Estimated recoverable oil: 180 billion to 18 trillion barrels

Sources: North America, Europe, and Asia per E.ON
The aggregate mass of organic matter in the Bazhenov Formation is as high as 18 trillion tons (126 trillion barrels of oil equivalent). It is known as one of the largest oil sources in the world.

Historical Bakken Estimates:
- USGS technically recoverable oil 1995 estimate was 151M barrels of oil for the Bakken.
- (USGS 2007) North Dakota and Montana have an estimated 3.0 to 4.3 billion barrels of undiscovered, technically recoverable oil in an area known as the Bakken Formation.
- Recoverable oil Bakken estimate 2010 by Continental Resources was 24 billion barrels.
- Recoverable oil Bakken estimate 2012 by Continental Resources is 27 to 45 billion barrels.

If the Bazhenov is Similar to Bakken
The 2000 estimate of 140 to 210 billion barrels of recoverable oil could be 15 to 100 times too low. The increase would be because of the improved horizontal drilling technology enabling a higher recover rate.

Source: EIA Short-Term Energy Outlook, Smith Technologies, American Petroleum Institute
Meantime, Back in the USA

- The USA became the world’s largest gas producer in 2009, thanks to the gas shales’ prolific output. . . Russia and the USA are swapping places every other year.

- . . . But the price of natural gas dropped to $3.50 per million btu, one-fifth of the thermodynamic correlation. . .

- . . . Which will increase natural gas use:
  - **For electricity. . .** Coal-fired electricity has dropped from 52% to 37.6% since 2000.
  - **For transportation. . .** California, New York, Utah, and Oklahoma are leading the way in natural gas vehicle infrastructure.
  - **For LNG exports. . .** Proposed LNG export projects total 32.22 bcf per day—48% of 2011 U.S. dry gas production.

<table>
<thead>
<tr>
<th>Company</th>
<th>Quantity</th>
<th>FTA Applications</th>
<th>Non-FTA Applications</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sabine Pass Liquefaction, LLC</td>
<td>2.2 billion cubic feet per day (Bcf/d)</td>
<td>Approved</td>
<td>Approved</td>
</tr>
<tr>
<td>Freeport LNG Expansion, L.P. and FLNG Liquefaction, LLC</td>
<td>1.4 Bcf/d</td>
<td>Approved</td>
<td>Under DOE Review</td>
</tr>
<tr>
<td>Lake Charles Exports, LLC</td>
<td>2.0 Bcf/d</td>
<td>Approved</td>
<td>Under DOE Review</td>
</tr>
<tr>
<td>Cabin Energy (USA) LLC</td>
<td>0.03 Bcf/d: FTA 0.01 Bcf/d: non-FTA</td>
<td>Approved</td>
<td>Under DOE Review</td>
</tr>
<tr>
<td>Dominion Cove Point LNG, LP</td>
<td>1.0 Bcf/d</td>
<td>Approved</td>
<td>Under DOE Review</td>
</tr>
<tr>
<td>Jordan Cove Energy Project, L.P.</td>
<td>1.2 Bcf/d: FTA 0.81 Bcf/d: non-FTA</td>
<td>Approved</td>
<td>Under DOE Review</td>
</tr>
</tbody>
</table>

Table continues on the next page
<table>
<thead>
<tr>
<th>LNG Company</th>
<th>Approved/Denied</th>
<th>Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>Cameron LNG, LLC</td>
<td>1.7 Bcf/d</td>
<td>Approved</td>
</tr>
<tr>
<td>Freeport LNG Expansion, L.P. and FLNG Liquefaction, LLC</td>
<td>1.4 Bcf/d</td>
<td>Approved</td>
</tr>
<tr>
<td>Gulf Coast LNG Export, LLC</td>
<td>2.8 Bcf/d</td>
<td>Approved</td>
</tr>
<tr>
<td>Gulf LNG Liquefaction Company, LLC</td>
<td>1.5 Bcf/d</td>
<td>Approved</td>
</tr>
<tr>
<td>LNG Development Company, LLC (d/b/a Oregon LNG)</td>
<td>1.25 Bcf/d</td>
<td>Approved</td>
</tr>
<tr>
<td>SB Power Solutions Inc.</td>
<td>0.07 Bcf/d</td>
<td>Approved</td>
</tr>
<tr>
<td>Southern LNG Company, LLC</td>
<td>0.5 Bcf/d</td>
<td>Under DOE Review</td>
</tr>
<tr>
<td>Excelerate Liquefaction Solutions I, LLC</td>
<td>1.38 Bcf/d</td>
<td>Under DOE Review</td>
</tr>
<tr>
<td>Golden Pass Production LLC</td>
<td>2.6 Bcf/d</td>
<td>Under DOE Review</td>
</tr>
<tr>
<td>Cheniere Marketing, LLC</td>
<td>2.1 Bcf/d</td>
<td>Under DOE Review</td>
</tr>
<tr>
<td>Main Pass Energy Hub, LLC</td>
<td>3.22 Bcf/d</td>
<td>N/A</td>
</tr>
<tr>
<td>CE FLNG, LLC</td>
<td>1.07 Bcf/d</td>
<td>Under DOE Review</td>
</tr>
<tr>
<td>Waller LNG Services, LLC</td>
<td>0.16 Bcf/d</td>
<td>N/A</td>
</tr>
<tr>
<td>Pagnea LNG (North America) Holdings, LLC</td>
<td>0.9 Bcf/d</td>
<td>Under DOE Review</td>
</tr>
<tr>
<td>Magnolia LNG, LLC</td>
<td>0.54 Bcf/d</td>
<td>Pending Approval</td>
</tr>
<tr>
<td>Total of applications received</td>
<td>32.22 Bcf/d</td>
<td>Under DOE Review</td>
</tr>
</tbody>
</table>
Meantime, Back in the USA (Continued)

Please retain three “Factoids”:

1. The USA becomes a net LNG exporter in 2016

2. The USA only imports half of its oil consumption by 2017*

3. The USA stops importing oil in 2033*

*Assumes flat consumption from the 2011 level
LNG as Fuel

• An important role as a heavy transportation fuel
  – On road
    • LNG for Tractor - Trailers
    • CNG for Light commercial and passenger vehicles
  – Off road
  – Marine
  – Rail

• Distribution and Economics are crucial factors
  – Evolving at High Rate
Marine Fuel

Existing Ship Types
- Ferries
- Container Feeder Vessels

New Concept Designs
- DNV Concept Vessel: Trialty - An LNG-fueled VLCC
- DNV Concept Vessel: Quantum 6,200 TEU container ship
Maersk-Argent Intermodal Vessel

(Talent Pending)
Intermodal LNG System

ISO Tanktainers: efficient storage, loading and transport

Trucking

Rail

Typical Container handling operations
Intermodal Systems
Vessel Fuel Propulsion / Bunkering

Marine Services GmbH
Approval In Concept - Bureau Veritas

MAERSK LINE, LIMITED
Argent Marine Companies
Europe is Leading The Way

- Major ports are driving adoption
  - Rotterdam
  - Antwerp
  - Hamburg
  - Baltics
- Every major shipping company
- Every major vessel segment
  - Ferries
  - Short Sea
  - Inland
  - Ocean

- Organizational Efforts
  - DMA
  - ADN
  - SIGTTO
  - IMO
  - Green Deal

- Classification
  - DNV
  - Lloyds
  - Bureau Veritas
  - ABS
Company Overview
Investment Highlights

**Global Market Leader**
- One of the largest tubular capacity
- High exposure to the oil & gas industry: approximately 74% of 2011 shipments went to the oil & gas sector
- Leading producer of value-added steel pipes for the oil & gas industry
- 14% global seamless OCTG(1), 12% of the U.S. OCTG market in 2011

**Leading Position in Russia and the U.S.**
- Russia: 52% seamless pipe market, 59% seamless OCTG market, 17% LD pipe market in 2011
- Strategic partnerships and long-term contracts with Russian oil & gas majors
- One of the leading supplier to shale oil & gas in the U.S.

**Favorable Industry Fundamentals**
- Strong industry fundamentals driven by robust demand for oil & gas
- Stable demand from Russian oil industry little affected by fluctuations in oil prices
- Consolidated industry with significant barriers to entry
- Demand for seamless OCTG expected to experience significant growth driven by increasing complexity of drilling
- Oil & gas plays are to be more resilient to possible economic recession due to limited supply from traditional deposits and geopolitical risks

**Vertically Integrated Low Cost Producer**
- Structural cost advantages over major international competitors
- Fully vertically integrated seamless pipe production (upstream and downstream operations) in all 3 divisions
- Long-term proven ability to pass cost increase to customers

**Growth Potential and Deleveraging**
- Strategic Investment Programme (2004-14) aimed at 48% capacity increase is nearly completed
- Ability to efficiently integrate acquired businesses and realise synergies
- The effect from the recent investment projects to be realized in 2012-2015 which will facilitate deleveraging

**Key Performance Figures**

<table>
<thead>
<tr>
<th>Year</th>
<th>2007</th>
<th>2008</th>
<th>2009</th>
<th>2010</th>
<th>2011</th>
<th>3Q 2012 LTM</th>
</tr>
</thead>
<tbody>
<tr>
<td>Revenue, U.S.$ mln</td>
<td>4,179</td>
<td>5,690</td>
<td>3,461</td>
<td>5,578</td>
<td>6,754</td>
<td>6,658</td>
</tr>
<tr>
<td>EBITDA, U.S.$ mln</td>
<td>920</td>
<td>1,047</td>
<td>328</td>
<td>942</td>
<td>1,050</td>
<td>1,033</td>
</tr>
<tr>
<td>ROE, %</td>
<td>28.9%</td>
<td>9.4%</td>
<td>neg</td>
<td>6.9%</td>
<td>22.4%</td>
<td>18.5%</td>
</tr>
</tbody>
</table>

(1) OCTG - Oil Country Tubular Goods
Global Operational and Sales Footprint

Steel Tubular Industry Leader

TMK's strategic positioning made it the steel tubular industry leader, with nearly 4 million tonnes sold in 2010 and more than 3.1 million tonnes sold in 9M 2011.

Global Drilling Activity

TMK Domestic Markets (Russia (including Caspian) and the U.S.) Represent 55% of Global Drilling Activity

<table>
<thead>
<tr>
<th>Capacity (tons)</th>
<th>North America</th>
<th>Europe</th>
<th>Russia and CIS</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Steelmaking</td>
<td>450,000</td>
<td>450,000</td>
<td>2,450,000</td>
<td>3,350,000</td>
</tr>
<tr>
<td>Seamless Pipes</td>
<td>300,000</td>
<td>200,000</td>
<td>2,420,000</td>
<td>2,920,000</td>
</tr>
<tr>
<td>Welded Pipes</td>
<td>1,150,000</td>
<td>2,200,000</td>
<td>3,350,000</td>
<td>3,350,000</td>
</tr>
<tr>
<td>Heat Treat</td>
<td>441,000*</td>
<td>1,500,000</td>
<td>1,941,000</td>
<td>1,941,000</td>
</tr>
<tr>
<td>Threading</td>
<td>981,000*</td>
<td>1,560,000</td>
<td>2,541,000</td>
<td>2,541,000</td>
</tr>
</tbody>
</table>

Note: *Including ULTRA Premium connections of 240,000 tons

Source: TMK data
# Sure Way to Leadership

## Thousand tonnes

<table>
<thead>
<tr>
<th>Company</th>
<th>2005</th>
<th>2006</th>
<th>2007</th>
<th>2008</th>
<th>2009</th>
<th>2010</th>
<th>2011</th>
</tr>
</thead>
<tbody>
<tr>
<td>TMK</td>
<td>2,858</td>
<td>3,034</td>
<td>3,073</td>
<td>3,227</td>
<td>2,785</td>
<td>3,969</td>
<td>4,232</td>
</tr>
<tr>
<td>Tenaris</td>
<td>3,371</td>
<td>3,497</td>
<td>4,309</td>
<td>4,509</td>
<td>2,650</td>
<td>3,120</td>
<td>3,761</td>
</tr>
<tr>
<td>Vallourec</td>
<td>2,400</td>
<td>2,880</td>
<td>2,838</td>
<td>2,766</td>
<td>1,503</td>
<td>1,888</td>
<td>2,251</td>
</tr>
</tbody>
</table>

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*Source: Press Releases of the Companies*
Russia
The increasing complexity of oil and gas production in Russia is expected to increase demand for higher value-added products.

**“60-66” Tax System**
Export duty for light and dark petroleum products to be calculated as 60% of the export duty for crude oil (with the exception of gasoline):
- Export duty for crude to be reduced by lowering the marginal rate from 65% to 60%
- Customs duty rate on gasoline to stay at 90%
- The System will operate through 2015

<table>
<thead>
<tr>
<th>Region</th>
<th>2010</th>
<th>2011F</th>
<th>2012F</th>
<th>2013F</th>
</tr>
</thead>
<tbody>
<tr>
<td>Western Siberia</td>
<td>318.8</td>
<td>315.8</td>
<td>313.1</td>
<td>313.1</td>
</tr>
<tr>
<td>Volga-Urals</td>
<td>107.0</td>
<td>104.3</td>
<td>101.7</td>
<td>99.2</td>
</tr>
<tr>
<td>Timan-Pechora &amp; Kaliningrad</td>
<td>32.4</td>
<td>32.4</td>
<td>32.4</td>
<td>32.0</td>
</tr>
<tr>
<td><strong>Far East</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Eastern Siberia</strong></td>
<td>17.5</td>
<td>25.5</td>
<td>31.5</td>
<td>38.0</td>
</tr>
<tr>
<td>North Caucasus &amp; Precaspian</td>
<td>11.1</td>
<td>12.3</td>
<td>12.9</td>
<td>14.8</td>
</tr>
<tr>
<td><strong>Total Oil Production</strong></td>
<td>505.1</td>
<td>509.3</td>
<td>513.6</td>
<td>520.0</td>
</tr>
</tbody>
</table>

Source: TMK estimates, VTB Capital
Increasing Complexity of Russian Drilling

**Horizontal Drilling is Expected to Double in the Next 5 Years**

**Lukoil Plans to Increase the Share of Horizontal Wells from 10% to 40% in 2011-2013**

**The Share of Greenfield Production is Projected to Reach 17% in 2015 Compared to Just 6% in 2010**

**Starting Well Flow Rates for Greenfield Projects are Significantly Higher Compared to Brownfield Production**

Source: VTB Capital, Industry Sources
Russian LDP Demand Drivers

Forecast LDP Demand by Project

Completed Gas Pipeline
Current Gas Pipeline Project
Expected Gas Pipeline Project
Completed Oil Pipeline
Current Oil Pipeline Project
Expected Oil Pipeline Project

Source: VTB Capital
While American division customers needs have shifted in 2012, TMK is well positioned to provide the PREMIUM and SEMI-PREMIUM connections required in different drilling environments; gas or liquid plays

- Due to a shift in drilling for oil in 2012, demand for has increased for SEMI-PREMIUM connections like **ULTRA DQX™**.

**API Premium Connections**

- **ULTRA DQX™**: Threaded and Coupled 100%
- **ULTRA FX™**: Threaded and Coupled 100%
- **ULTRA FJ™**: Slim-line Upset Tubing 70%
- **ULTRA SF™**: Integral Joint 90%
- **ULTRA CX™**: Slim-line Threaded and Coupled 100%
- **ULTRA QX™**: Threaded and Coupled 100%

*Strength in Tension and Compression compared to Pipe*
Shift to Unconventional Drilling

### Conventional (Vertical) Drilling vs. Unconventional (Horizontal) Drilling (Hydraulic Fracturing)

<table>
<thead>
<tr>
<th></th>
<th>Vertical Shale</th>
<th>Horizontal Shale</th>
</tr>
</thead>
<tbody>
<tr>
<td>Length, km</td>
<td>Up to 5</td>
<td>Up to 10</td>
</tr>
<tr>
<td>% Seamless</td>
<td>35%</td>
<td>60%</td>
</tr>
<tr>
<td>% Premium Connections</td>
<td>&lt;5%</td>
<td>30%</td>
</tr>
<tr>
<td>OCTG Tons per Well</td>
<td>45</td>
<td>190</td>
</tr>
<tr>
<td>% Small OD &lt;7&quot;</td>
<td>25%</td>
<td>65%</td>
</tr>
</tbody>
</table>

*Source: J.P. Morgan, Industry Sources*
Advances in Steam Assisted Gravity Drained (SAGD) Wells

(e.g., Cenovus Energy Inc., Calgary)

Wedge Wells

SAGD Pair (side view)

Two Staged Pairs (Initial)

Two Staged Pairs (final) With Wedge Well
Today Canada is the source of over 20% of U.S. crude oil imports; it’s estimated that half of Canadian imports come from the oil sands. The IHS Cambridge Energy Research Associates project that the oil sands will account for 36% of U.S. oil imports by the year 2030. We at TMK think: 48%

Source: New York Times, EIA
Middle East
GIPI – Sohar, Oman

GIPI – Office Building and Metallurgical Testing

GIPI – Primary Weld Mill and Finishing Facility

ERW Mill – Strip Entering Forming Section

GIPI – Finishing Floor
### GIPI ERW Mill Capabilities

<table>
<thead>
<tr>
<th>Parameter</th>
<th>Min</th>
<th>Max</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Capacity</strong></td>
<td>Approx. 250,000 metric tons / yr.</td>
<td></td>
</tr>
<tr>
<td><strong>O. D.</strong></td>
<td>8 5/8 in. / 219 mm</td>
<td>24.0 in. / 610 mm</td>
</tr>
<tr>
<td><strong>Wall Thickness</strong></td>
<td>0.160 in. / 4.0 mm for 8 5/8” O.D.</td>
<td>1.000 in. / 25.4 mm for 24.0” O.D.</td>
</tr>
<tr>
<td><strong>Threading</strong></td>
<td>OD 5 ½ in. / 140 mm</td>
<td>OD 13 3/8 in. / 340 mm</td>
</tr>
<tr>
<td><strong>Coating</strong></td>
<td>3 Layer Polyethylene and Fusion Bond Epoxy</td>
<td></td>
</tr>
<tr>
<td><strong>Advantages</strong></td>
<td>State of the Art Design</td>
<td>Good Quality, Good Yield, Conversion Costs</td>
</tr>
</tbody>
</table>
Investments
Investment Projects

Russia

Construction of EAF at Tagmet
Investment: U.S.$ 452 mln
Project Launch: 2013
Capacity Increase: + 950 k tonnes

Construction of FQM Mill at Seversky Pipe Plant
Investment: U.S.$ 274 mln
Project Launch: 2013
Capacity Increase: + 600 k tonnes, including:
- Line Pipe +280 k tonnes
- OCTG +320 k tonnes

USA

R&D Center in Houston
Investment: U.S.$26 mln
Timing: End 2012

The in-house R&D Center will allow for significant strengthening of the Company’s research potential, further improvement of the product mix and quality as well as performing much of the connections testing and metallurgical inspection to ensure TMK pipes meet the highest quality standards

ULTRA Threading and Heat Treatment
Investment: U.S.$67 mln
Period: 2011-2016
Additional Capacity: 230 thousand tons

Investment: U.S.$111 mln
Period: 2011-2016
Additional Capacity: 280 thousand tons

$2 billion by the end of 2019

$1 billion by the end of 2019
Investment Projects (Continued)

Oman

**ERW Mill**
Investment: N.A.
Project Launch: December, 2012

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USA

**Corporate Headquarters in Houston**
Investment: N.A.
Project Launch: April, 2013

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Edmonton, Alberta, Canada

**Threading Shop**
Investment: N.A.
Project Launch: November, 2012
The New Frontier

A) The Arctic
Arctic Region

Arctic Region

• The USGS Arctic assessment estimated a total oil and natural gas resource of 412 billion barrels of oil equivalent, with 78 percent of those resources expected to be natural gas and natural gas liquids (NGL).

• According to the USGS mean estimate, the Arctic holds about 22 percent of the world’s undiscovered conventional oil and natural gas recourse base, about 30 percent of the world’s undiscovered natural gas resources, about 13 percent of the world’s undiscovered oil resources, and about 20 percent of the world’s NGL resources.

• Eurasia is estimated to hold about 63 percent of the total Arctic resource base, while North America holds about 36 percent.
• While the Eurasian side of the Arctic is more natural-gas-prone, the North American side is more oil-prone. The North American side of the Arctic is estimated to have about 65 percent of the undiscovered Arctic oil, but only 26 percent of the undiscovered Arctic natural gas.

• Arctic ice is now so thin in summer, that shipping across Russia’s North has become feasible. This route saw two vessels in 2007, and 57 vessels in 2012 by the time shipping season closed in August. Experts estimate the route’s capacity at 50 million per year.
The New Frontier

B) Gas Hydrates
Gas Hydrates Occur:

- On land, but mostly at the foot of the continental shelf
- At depths from 250m to 2,000m
- By themselves or as a “cap” over free gas
- A lot: by some estimates, there are 10,000 gigatons worldwide, or 50,000 TCF as against all gas at 13,000 TCF

Nautilus’s Underwater Riches
- A Gas Hydrate Mining “Dry Run” -

Nautilus Minerals is a Canadian company with a market cap of about 450 million Canadian dollars. It is a world leader in the field of searching for and studying mineral resources for subsequent development.

Nautilus signed its first lease agreement for mineral extraction from the seabed with the government of Papua New Guinea in January 2011. The leased block is a region approximately 59 square kilometers in area, 30 kilometers off the coast of New Ireland, where Nautilus plans to extract massive sulfides at a depth of about 1,600 meters.

Pipe for Nautilus Minerals were produced at the Volzhsky Pipe Plant. Volzhsky is Russia’s first certified producer of X80QO high-strength seamless line pipe (compliant with API Spec. 5L/ISO 3183), which is intended for the construction of offshore subsea pipelines. TMK products were delivered to General Marine Contractors (Houston, Texas) for welding and assembly of the pipeline system.
Appendix – TMK Global Assets